

Club Visitation Form

The goal of our Chapter Directors is to assist our members in furthering their financial and investing education. This includes making visits to investment clubs, what we term 'club visits.' To assist us in meeting your needs and how best to assist you, we need information about you. Please fill out this form completely. Your answers to the following questions will help us to prepare how best to meet your needs and/or problems. When completed, please forward this form to the Houston Chapter to request a club visit. Submit to NAIC Houston Chapter, Attn: Club Visits, P. O. Box 14196, Humble, TX 77347-4196 or call 713-643-7661 or email: membership@naichouston.org

Club Name: _____

Age of club: _____ Club contact: _____

Phone: (_____) _____ E-mail: _____

****Please be sure the e-mail address you provide is checked frequently and does not have Spam filters enabled.***

Best time to contact you: Morning Afternoon Evening

Meeting Address: (address, city, zip)

Meeting location: (home, business, etc and general area.)

Directions to Meeting Site:

Date of meeting: _____ Time of meeting: _____

Number of members: _____ Is club a member of NAIC?: _____ How many club members are NAIC members?: _____

How many members have taken classes to learn the SSG (Stock Selection Guide)? _____

How many members have access to OPS (On-line Premium Services)? _____

When studying a stock and completing the SSG, do any of the members use NAIC computer software such as Toolkit, Stock Analyst or Classic? ___ Yes ___ No

if Yes, which software program(s) _____

What is the reason for your club call request? Please include: what, if any problems, your club has encountered in running the club, member participation, researching stocks, doing the SSG, or anything else? Please be specific. _____

CLUB VISIT FORM (PAGE 2)

Club Name: _____

Which of the following NAIC materials or services have your club or your club members used?

- | | | |
|---|--|---|
| <input type="checkbox"/> NAIC Official Guide Handbook (Old) | <input type="checkbox"/> Main Street Millionaires book | <input type="checkbox"/> NAIC Investor's Toolkit software version 4 |
| <input type="checkbox"/> Introduction to Successful Investing Handbook | <input type="checkbox"/> Better Investing Magazine | <input type="checkbox"/> NAIC Stock Analyst software |
| <input type="checkbox"/> Mutual Fund Tools Handbook | <input type="checkbox"/> NAIC Online Premium Services (OPS)/BITS | <input type="checkbox"/> NAIC Classic software |
| <input type="checkbox"/> NAIC Club Operations Handbook | <input type="checkbox"/> IClub Central Investor Advisory Service (IAS) | <input type="checkbox"/> NAIC Classic Plus software |
| <input type="checkbox"/> NAIC Stock Selection Handbook | <input type="checkbox"/> Stock Selection Guide Video | <input type="checkbox"/> NAIC Club Accounting software |
| <input type="checkbox"/> Investment Club Accounting Manual | <input type="checkbox"/> NAIC On-line Mutual Fund Resource Center | <input type="checkbox"/> NAIC Portfolio Record Keeper software |
| <input type="checkbox"/> Computerized Investing & the Internet Handbook | <input type="checkbox"/> NAIC Investors Toolkit software version 5 | <input type="checkbox"/> Manual Stock Study forms |
| | | <input type="checkbox"/> NAIC Low Cost Investment Plan |
| | | <input type="checkbox"/> NAIC Manual SSG Form |

Which of the following Houston Chapter of the NAIC's classes/events have your club members attended?

- | | | |
|--|---|---|
| <input type="checkbox"/> Basics of Investing | <input type="checkbox"/> Monthly Chapter Meetings | <input type="checkbox"/> Basic Treasurer's Workshop |
| <input type="checkbox"/> Beginning SSG | <input type="checkbox"/> 2004 Edfest | <input type="checkbox"/> Annual Reports Workshop |
| <input type="checkbox"/> SSG Review & Basics of Judgment | <input type="checkbox"/> Mutual Fund workshop | <input type="checkbox"/> Toolkit Workshop |

BELOW TO BE FILLED OUT BY NAIC CHAPTER REPRESENTATIVE

Presentation content (explain briefly what you covered – use back of form if needed):

Materials provided: _____

Programs, training and/or material that club wishes NAIC to provide in the future:

NAIC Representative: _____

Date: _____